

PROJECT PROPOSAL DOCUMENT

# ATM WhatsApp Support Bot

QR Scan → Smart Bot Journey → Live Agent → Call Connect

A complete WhatsApp-based ATM support platform using Official **WATI** and **Ultramsg** APIs, with a full Admin Panel to build conditional question journeys, allocate agents, and connect customers via call.

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Document Type: Client Proposal (English)

Modules: Web Admin Software + WhatsApp Bot + Agent Desk + Calling

Status: Proposal / Scope Document

Confidential – For Client Review

# 1. Executive Summary

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When a customer faces any ATM problem (cash stuck, amount debited but not dispensed, card retained, machine error, or any other issue), they scan a QR code placed at the ATM. WhatsApp opens and connects them to our support number.

**Core idea:** Bot handles first-level support using admin-designed questions. If the issue is not resolved, a live agent is assigned on WhatsApp and both customer + agent are connected on a call using Call API.

## What the platform includes

### 1. WhatsApp Bot

Greeting, guided questions, conditional paths, ticket creation

### 2. Admin Web Panel

Question builder, Yes/No routing, ATM QR, agents, reports

### 3. Agent Desk

WhatsApp allocation, chat reply, ticket history, call trigger

### 4. Calling Module

Bridge call between customer and assigned agent

## APIs used

- **WATI** Official WhatsApp Business API partner (templates, delivery, enterprise messaging)
- **Ultramsg** Complementary WhatsApp messaging workflows and flexibility
- **Call API** Voice bridge so customer and agent speak live

## 2. Customer Journey (End-to-End)

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1. Customer has ATM issue (cash stuck / failed txn / card problem / other).
2. Scans QR code at ATM.
3. WhatsApp opens → connects to our support WhatsApp number.
4. Bot sends greeting and starts question journey.
5. Customer answers questions. Path changes based on Yes / No / option selected.
6. Bot tries to resolve / collects full issue details.
7. If still unresolved → system allocates a live agent on WhatsApp.
8. Agent replies on WhatsApp with full context.
9. If needed → Call API connects customer + agent on voice call.
10. Ticket closed with notes, call log, and resolution status.

### ATM Problem

- > Scan QR Code
- > WhatsApp Chat Opens
- > Bot Greeting
- > Question Journey (Admin Controlled)
  - |-- YES answer -> Next Question Path A
  - |-- NO answer -> Next Question Path B
- > Resolved by Bot?
  - |-- YES -> Close / Thank You
  - |-- NO -> Assign Live Agent (WhatsApp)
    - > Agent Chat Reply
    - > Trigger Call Bridge (Customer <-> Agent)
    - > Resolve & Close Ticket

### 3. Web Software Modules (Admin Panel)

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This is the complete web software the client/ops team will use.

| Module                            | What it does                                                                                        |
|-----------------------------------|-----------------------------------------------------------------------------------------------------|
| <b>Dashboard</b>                  | Live chats, open tickets, bot vs agent resolution %, ATM hotspots, SLA alerts                       |
| <b>Question / Journey Builder</b> | Create questions, options, Yes/No branching, next-question rules, resolution tips, escalation rules |
| <b>ATM &amp; QR Manager</b>       | Add ATM ID, branch, location; generate QR; map QR scan to ATM context                               |
| <b>Agent Manager</b>              | Create agents, shifts, skills, WhatsApp allocation rules, availability status                       |
| <b>Agent Desk / Inbox</b>         | Assigned chats, reply on WhatsApp, view full journey answers, raise call                            |
| <b>Calling Center</b>             | Trigger customer-agent call, call status, call logs linked to ticket                                |
| <b>Ticket Center</b>              | Ticket list, status (Open/In Progress/Resolved), priority, notes, history                           |
| <b>Reports &amp; Analytics</b>    | Issue types, resolution time, escalation rate, agent performance, ATM-wise reports                  |
| <b>Settings</b>                   | WATI / Ultramsg / Call API keys, greetings, working hours, templates, roles & permissions           |

## 4. Question Builder (Admin Controlled)

Admin panel se pura conversation journey banega. Developer ke bina business team questions add/edit kar sakti hai. Har answer ke hisaab se next question decide hoga.

### 4.1 What Admin can configure

- Greeting message text
- Question text
- Answer type: Yes/No, Multiple Choice, Free Text, Image/Receipt upload
- For each answer: **Next Question** mapping
- Resolution message / self-help tip after a path
- Escalation rule: "If not resolved → send to agent"
- Enable / disable a journey version
- Order / rearrange questions

### 4.2 Branching rule (Yes / No example)

| Question                               | If YES                                                                         | If NO                                                                |
|----------------------------------------|--------------------------------------------------------------------------------|----------------------------------------------------------------------|
| Q1. Was cash supposed to be dispensed? | Ask Q2: Did machine show "Please take cash"?                                   | Ask Q3: What other issue are you facing?                             |
| Q2. Was amount debited from account?   | Ask amount, time, last 4 card digits, ATM ID → Create ticket → Agent if needed | Guide retry steps / nearby ATM suggestion → Ask "Is issue resolved?" |
| Q4. Is your issue resolved now?        | Send thank-you message and close chat                                          | Escalate to live agent + optional call connect                       |

**Important:** "Yes aaya to next question X, No aaya to next question Y" — ye poora Admin Panel se configure hoga. Same logic multiple-choice options pe bhi lagega (Option A → Q5, Option B → Q8, etc.).

## 5. Sample Question Journey (ATM Cash Issue)

BOT: Hello! Welcome to ATM Support. We are here to help.

BOT: Please select your issue:

- 1) Cash not received
- 2) Card retained
- 3) Transaction failed / amount debited
- 4) Other

USER: 1) Cash not received

BOT: Was the amount debited from your account? (Yes / No)

-- If YES --

BOT: Please share:

- Approximate amount
- Transaction time
- Last 4 digits of card
- ATM ID (auto if QR mapped)

BOT: Thank you. We have registered your complaint.

BOT: Do you want to talk to our agent now? (Yes / No)

YES -> Assign Agent + Start Call option

NO -> Ticket created, updates on WhatsApp

-- If NO --

BOT: Please try these steps:

- 1) Wait 30 seconds near ATM
- 2) Check if cash tray opened
- 3) Do not leave ATM yet

BOT: Is cash received now? (Yes / No)

YES -> Great! Issue resolved. Thank you.

NO -> Escalate to Agent + Call Connect

All texts and next-step links above are editable from Admin → Journey Builder.

## 6. Agent Desk + Calling Module

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### 6.1 Agent allocation (WhatsApp)

- When bot cannot resolve, ticket auto-escalates.
- System allocates available agent based on rules (shift, skill, language, load).
- Agent gets chat on Agent Desk with full conversation + ATM details + customer answers.
- Agent replies directly to customer on the same WhatsApp thread.
- Customer does not need to change number or app.

### 6.2 Calling feature (Customer ↔ Agent)

- Agent (or auto-rule) triggers **Call Connect** from panel.
- Call API dials / bridges both sides: Customer number + Agent number.
- Both receive the call and get connected for live voice support.
- Call status and duration are saved in ticket history.
- Useful for complex ATM disputes needing real-time guidance.

### 6.3 Agent Desk screens (web software)

#### My Chats

Open assigned WhatsApp conversations

#### Ticket Detail

Journey answers, ATM ID, timeline

#### Reply Box

Send WhatsApp reply to customer

#### Call Button

One-click bridge call to customer

**Result:** Bot does first-level work. Agent handles only unresolved cases — with full context and optional live call.

## 7. High-Level Architecture

| Layer      | Components                                                |
|------------|-----------------------------------------------------------|
| Channel    | WhatsApp via WATI + Ultramsg webhooks                     |
| Bot Engine | Greeting, journey runner, Yes/No router, ticket create    |
| Web Admin  | Question builder, ATM/QR, agents, settings, reports       |
| Agent Desk | Inbox, reply, escalation handling                         |
| Calling    | Call API bridge (customer + agent)                        |
| Data       | Users, journeys, sessions, tickets, call logs, ATM master |
| Security   | Roles, API secrets, webhook validation, audit logs        |

### Roles in web software

- **Super Admin** – APIs, settings, full access
- **Ops Admin** – journeys, ATM QR, reports
- **Supervisor** – monitor agents, SLA, reassign chats
- **Agent** – reply chats, trigger calls, update tickets



## 8. Complete Feature List for Client

| #  | Feature                                        | Where                |
|----|------------------------------------------------|----------------------|
| 1  | ATM QR scan to WhatsApp support                | ATM + Bot            |
| 2  | Auto greeting after connect                    | Bot                  |
| 3  | Admin question / journey builder               | Web Admin            |
| 4  | Yes → next question / No → other question      | Web Admin + Bot      |
| 5  | Multiple choice & free-text capture            | Bot                  |
| 6  | ATM ID auto attach from QR                     | ATM Manager          |
| 7  | Ticket creation with collected answers         | Bot + Ticket Center  |
| 8  | Auto escalate if unresolved                    | Bot Engine           |
| 9  | WhatsApp live agent allocation                 | Agent Manager + Desk |
| 10 | Agent WhatsApp reply with full context         | Agent Desk           |
| 11 | Call bridge customer + agent                   | Calling Module       |
| 12 | Dual API: Official WATI + Ultramsg             | Settings / Channel   |
| 13 | Reports: bot resolve %, escalation, ATM issues | Reports              |
| 14 | Roles & permissions                            | Settings             |

## 9. Suggested Delivery Phases

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1. **Phase 1 – MVP:** QR connect, greeting bot, Admin question builder (Yes/No routing), WATI/Ultramsg webhooks
2. **Phase 2:** Ticket center, ATM mapping, basic reports
3. **Phase 3:** Live Agent Desk + WhatsApp allocation
4. **Phase 4:** Calling module (customer + agent bridge)
5. **Phase 5:** Advanced analytics, multi-language, multi-region rollout

## 10. What We Need From Client

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- ATM issue categories + current SOP
- WhatsApp Business number(s) and greeting tone
- Agent team list, shifts, escalation matrix
- Call API / telephony preference (if already available)
- Pilot ATM list for QR rollout
- Branding / compliance guidelines

## 11. Next Steps

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- Client reviews this proposal
- Freeze Phase-1 MVP scope
- Confirm WATI + Ultramsg + Call API setup
- Share first sample journey (one ATM issue type)
- Kick off development + Admin Panel demo

### Thank you

ATM WhatsApp Support Bot — Instant help at the ATM, smart question journeys from Admin, live agent on WhatsApp, and call connect for complex cases.